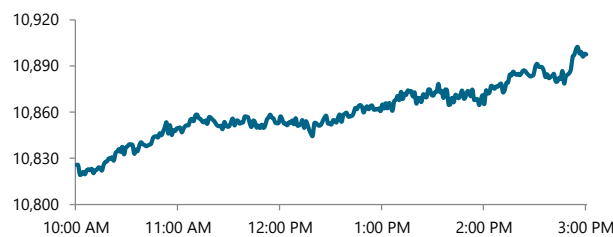


# Daily Markets Overview

14 June 2021

## TASI Intraday



## Saudi Stock Indices

Index	Last Close	1 Day %	WTD %	YTD %	PE (TTM)
Saudi (TASI)	10,897	0.9	0.9	25.4	32.7
Saudi (NOMUC)	23,145	-1.0	-1.0	-11.8	NA
Energy	5,577	0.0	0.0	3.5	35.2
Materials	7,334	0.7	0.7	27.6	44.1
Capital Goods	9,041	0.8	0.8	38.3	33.3
Com. & Prof. Svc	4,375	0.1	0.1	7.8	NA
Transportation	6,321	0.3	0.3	30.5	NA
Cons. Durables & Apparel	7,992	0.7	0.7	39.7	NA
Consumer Services	4,883	0.7	0.7	14.4	NA
Media	18,934	-0.3	-0.3	85.3	NA
Retailing	10,761	0.2	0.2	25.8	45.3
Food & Staples Retailing	11,059	-0.3	-0.3	5.0	33.3
Food & Beverages	6,337	1.2	1.2	16.0	35.7
Health Care Equipment	7,854	0.3	0.3	38.9	41.8
Pharma, Biotech & Life Science	7,388	0.7	0.7	42.9	NA
Banks	10,090	1.4	1.4	33.0	23.2
Diversified Financials	7,891	-0.2	-0.2	71.7	NA
Insurance	6,469	0.4	0.4	7.4	37.7
Telecommunication	8,740	2.7	2.7	26.7	26.8
Utilities	5,411	0.0	0.0	17.4	22.8
REITs	4,954	-0.1	-0.1	15.6	37.7
Real Estate	3,654	-0.2	-0.2	21.0	NA

Sources: Bloomberg, Reuters, Tadawul

## Top 5 Gainers

Company	Last Close	% Change	Value (SAR mn)
Arab Sea Information System Co.	112.40	10.0%	225
Alkhaleej Training and Education Co.	32.00	8.8%	336
National Gypsum Co.	49.40	7.6%	255
The National Company for Glass Industries	44.50	5.7%	275
Jazan Energy and Development Co	25.25	5.2%	509

Source: Tadawul

## Upcoming General Assembly Meetings

Company	Date
Tabuk Agricultural Development Co.	15-Jun-21
Al Abdullatif Industrial Investment Co.	15-Jun-21
Saudi Arabia Refineries Co.	15-Jun-21
Allied Cooperative Insurance Group	15-Jun-21
Maharah Human Resources Co.	15-Jun-21
Al-Omran Industries & Trading Co.	15-Jun-21

Source: Tadawul

## Saudi Market Update

- TASI closed 0.9% higher at 10,897, while NOMUC declined 1.0% to 23,145 on Sunday. TASI traded value totaled SAR 14.4bn and averaged SAR 12.1bn over the last 30 days. The five most active stocks (by value) in TASI accounted for 17.3% of the daily traded value.
- MSCI Emerging Markets was closed for trading on Sunday.
- Banks and Materials ended 1.4% and 0.7%, respectively. Telecom gained 2.7% and was the best performing sector. Among stocks, Arab Sea Information System Co. (9505/ARABSEA AB), Alkhaleej Training and Education Co. (4290/ALKHLEEJ AB), and National Gypsum Co. (2090/NGCO AB), led the gainers.
- According to the Saudi Central Bank (SAMA), online sales performed through Mada cards soared by 85% Y/Y to reach SAR 5.56bn (USD 1.5bn) in April 2021. The sales were performed through 25.57 million transactions. (Source: Argaam)
- Al Moammar Information Systems Co. (7200/MIS AB) renewed and modified SAR 332.5mn (USD 88.7mn) worth of Sharia-compliant credit facility with Banque Saudi Fransi (1050/BSFR AB). The credit facility will be used to finance new projects, and issue letters of initial, final, and submitted guarantees. (Source: Argaam)
- Saudi Arabian Mining Co. (1211/MAADEN AB) announced the completion of the pre-operational stage for the facilities of the third ammonia plant at a total value of USD 900mn (SAR 3.4bn) in Ras Al-Khair Industrial City. The company expects construction to be completed in 4Q21, with full operation to begin in 1Q22. (Source: Argaam)
- According to reports, the BoDs of Dur Hospitality Co. (4010/DUR AB) and Taiba for Investment Co. (4090/TAIBA AB) will start preliminary discussions to study a possible merger. The report added that the merger will be subject to conditions and approvals of the regulatory entities concerned and the consent of shareholders of both companies. (Source: Argaam)
- Saudia Dairy and Foodstuff Co. (2270/SADAFSCO AB)'s BoDs recommended a cash dividend of SAR 3 per share for 2H21 ended March 31, 2021, implying a full-year yield of 3.0%. (Source: Argaam)

## Top 5 Losers

Company	Last Close	% Change	Value (SAR mn)
Astra Industrial Group	46.50	-3.5%	214
Saudi Chemical Co.	41.00	-2.8%	110
Arabian Shield Cooperative Insurance Co.	25.30	-2.7%	16
United Cooperative Assurance Co.	24.74	-2.2%	15
Jadwa REIT Al Haramain Fund	9.67	-2.0%	24

## Most Active Stocks by Value (SAR mn)

Company	Last Close	% Change	Value (SAR mn)
Theeb Rent a Car Co.	60.00	2.4%	773
Jazan Energy and Development Co	25.25	5.2%	509
Al Gassim Investment Holding Co.	33.15	3.1%	448
Al Rajhi Bank	109.60	3.8%	435
Saudi Advanced Industries Co.	55.10	-1.1%	340

Source: Tadawul

**NOTES:** (1) Prices as of last trade. Updated as of June 13, 2021  
(2) WTD: Week to Date and YTD: Year to Date

# Daily Markets Overview

14 June 2021

## GCC Stock Indices

Index	Last Close	1 Day %	WTD %	YTD %	PE (TTM)
Dubai (DFM)	2,842	0.0	0.0	14.1	21.6
Abu Dhabi (ADX)	6,702	-0.2	-0.2	32.8	22.5
Kuwait (KSE)	6,328	0.6	0.6	17.8	NA
Qatar (QE)	10,739	0.2	0.2	2.9	18.2
Oman (MSM)	4,040	0.3	0.3	10.4	14.2
Bahrain (BSE)	1,553	0.4	0.4	4.2	26.7
DJMENA Index	690	0.5	0.5	18.7	NA

Source: Bloomberg, Reuters

## Global Stock Indices

Index	Last Close	1 Day %	WTD %	YTD %	PE (TTM)
US (S&P 500)	4,247	0.2	0.4	13.1	30.0
US (NASDAQ 100)	14,069	0.4	1.8	9.2	32.4
UK (FTSE 100)	7,134	0.6	0.9	10.4	NA
Germany (DAX)	15,693	0.8	0.0	14.4	33.6
France (CAC 40)	6,601	0.8	1.3	18.9	47.3
Russia (MICEX)	3,842	0.4	0.9	16.8	10.9
Japan (Nikkei)	28,949	0.0	0.0	5.5	20.3
Hong Kong (HSI)	28,842	0.4	-0.3	5.9	13.7
South Korea (KOSPI)	3,249	0.8	0.3	13.1	20.8
China (SHCOMP)	3,590	-0.6	-0.1	3.4	16.2
India (NIFTY)	15,799	0.4	0.8	13.0	31.0
Brazil (IBOV)	129,441	-0.5	-0.5	8.8	15.9
Turkey (BIST 100)	1,461	0.3	1.9	-1.1	9.9
Egypt (EGX30)	9,978	0.0	-0.8	-8.0	NA
MSCI Emerging Markets	1,382	0.2	0.0	7.0	17.3
MSCI World	3,013	0.2	0.5	12.0	30.1

Source: Bloomberg, Reuters

## Commodities Prices

Index	Last Close	1 Day %	WTD %	YTD %	1 Year %
Brent Crude (\$/bbl)	72.7	0.2	1.1	40.3	74.2
Natural Gas (\$/mmbtu)	3.3	4.7	6.4	29.8	28.6
Gold (\$/oz)	1,878	-1.1	-0.7	-1.1	8.0
Silver (\$/oz)	27.9	-0.3	0.4	5.7	54.1
Platinum (\$/oz)	1,151	-0.4	-1.6	7.3	36.7
Copper (\$/t)	9,975	1.1	0.4	28.7	69.5
Zinc (\$/t)	3,027	1.8	1.3	10.9	50.5
Lead (\$/mt)	2,198	1.4	2.4	11.5	26.6
Wheat (\$/bu)	686	-0.6	-0.3	7.1	27.5
Corn (\$/bu)	610	-1.1	-10.7	26.0	63.5
Sugar (\$/lb)	17.7	-0.3	-0.2	14.1	41.4

Source: Bloomberg

## Interest Rate Watch (3M Interbank Offer Rate, %)

Country	Last Close	1 Day Change	YTD Change	Spread*
US	0.12	0.00	-0.12	0.00
Saudi Arabia	0.79	0.00	-0.03	0.67
UAE	0.37	-0.01	-0.14	0.25
Kuwait	1.50	0.00	0.06	1.38
Qatar	1.18	0.14	0.05	1.06
Bahrain	1.64	0.00	-0.61	1.52

Source: Reuters

### NOTES:

(1) Prices updated as of June 11, 2021 (2) WTD: Week to Date; YTD: Year to Date; NA: Not Applicable, \*Spread = US 3M Rate – Country 3M Rate

## GCC & Global Markets Update

- Global markets were closed for trading on Sunday.
- Asian markets are trading mixed on Monday. China is closed for trading. Japan and South Korea are up 0.6% and 0.1%, respectively. Hong Kong is closed for trading, while India is trading 0.8% lower, in the morning session.
- GCC markets ended mixed on Sunday. Dubai closed flat, while Abu Dhabi declined 0.2%. Kuwait and Qatar increased 0.6% and 0.2%, respectively. Oman and Bahrain ended 0.3% and 0.4% higher, respectively.
- According to reports, Kuwait's gross domestic product (GDP) contracted 9.9% in 2020, compared with growth of 0.4% in 2019, mainly because of the sharp drop in oil prices. (Source: Zawya)
- UAE's Department of Trademarks and Intellectual Works revealed that 2,772 intellectual works were registered in 2020, up from 1,632 in 2019, which itself was an increase of 32% on 2018. A total of 24,317 have been registered since the registration process began. (Source: Zawya)
- The Dubai Electricity and Water Authority (DEWA) will add 600 megawatts (MW) of clean energy capacity using photovoltaic solar panels and concentrated solar power (CSP) this year. This will increase DEWA's total power capacity from clean energy to 1,613 MW compared to 1,013 MW currently. DEWA plans to commission the 300MW first stage of the fifth phase of the Mohammed bin Rashid Al Maktoum Solar Park next month. (Source: Decypha)
- Ras Al Khaimah Department of Economic Development (RAK DED) has signed an agreement with talabat UAE as part of its continuous efforts to support Emirati home projects in the Emirate. This partnership is aimed at paving the way for home business owners in Ras Al Khaimah to further grow and contribute to bolstering the Emirate's economy. (Source: Trade Arabia)

## Coming Up

- Japan's Industrial Production for April 2021 (prior: 1.7% M/M) will be announced today. (Source: Trading Economics)
- US EIA Petroleum status report on weekly change in crude oil inventories for the week ended June 11 (prior: -5.2mn barrels) will be announced on June 16. (Source: Trading Economics)
- US jobless claims for the week ended June 12 (prior: 376K) will be announced on June 17. (Source: Trading Economics)

# Daily Markets Overview

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### Saudi Fransi Capital (Closed Joint Stock Company Owned by Banque Saudi Fransi)

Authorized and regulated under Capital Market Authority license 11153-37. The company is operating under commercial registration 1010231217 with a paid up capital of SAR 500,000,000.

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